



### BEFORE YOU BEGIN, COMPLETE THE FOLLOWING:



**1. Check for duplicates (active MEs for the same individual).** Search the **Monitoring Events Tab** and determine if there is already an active monitoring event (ME) for this individual. If there is, update this active ME appropriately and do not create a new one. **If you have not found an active duplicate, continue to the next step.**



**2. Check for past MEs (inactive MEs for the same individual).** If an inactive ME for this individual already exists, you can visit their person record and click **+New Monitoring Event** (from within the person record's *Monitoring Events* page) to create a pre-populated event in line with the section-by-section guidance below. **If you do not identify an inactive ME, continue to the next step.**



**3. If there is not any ME that matches this person, click +New at the top of the Monitoring Events Tab.**

### Review these key fields when creating a new contact monitoring event:

Fields with \* are required to create your contact monitoring event (ME).

Fields with + are required by the state to track data.

## #1: Record Information

### • Contact or Case Patient\*

Record Information

🔒 C# ---

Contact or Case \* Contact

Patient

Person ---

#### *Associating Your ME With a Person Record*

If you have not found another ME that matches this individual, leave the **Person** field **blank**. CCTO will automatically look for a match upon saving and 1) associate your ME with an existing person record OR 2) create a new person record. *If the system matches an incorrect person record upon saving, [see top of p.5 for next steps](#).*

## #2: Basic Info

- First Name\*
- Last Name\*
- Date of Birth<sup>+</sup> (not used for notification, but used in [digital monitoring](#))

Basic Info

Priority Contact or Case ☐ No

First Name \* Minnie

Middle Name ---

Last Name \* Mouse

Preferred Name ---

Date of Birth (DOB) + 3/12/1950

The **Priority Case or Contact** toggle allows you to flag a contact who is higher priority to receive a phone call. **Check with your supervisor and your local policies to see if you should be using this toggle.**

Source Case Information

Ongoing Exposure ☐ No

NC-COVID Event ID of Source Patient #1 (Use the number) **101454458**

Last Date of Exposure to Source Patient #1 **11/18/2020**

NC-COVID Event ID of Source Patient #2 (Use the number) ---

Last Date of Exposure to Source Patient #2 ---

Monitoring End Date **11/28/2020**

### #3: Source Case Information

- Ongoing Exposure (if, for example, your contact lives with a case patient)
- NC-COVID Event ID<sup>+</sup> (for the case patient who named this contact)
- Last Date of Exposure<sup>\*</sup>  
(If the **Monitoring End Date** field is blank, it will auto-calculate for 10 days after the date in this field. **ACTION:** Update **Monitoring End Date** manually if it needs to be another date.)

Contact Information

U.S. Primary Phone (will be used for text messages) **1-455-454-5454**

U.S. Phone #2 1-\_\_\_\_-\_\_\_\_

Country Code ---

Phone #3 ---

Email **email@emailtesting.com**

Preferred Method of Contact **Phone Call**

Preferred language **English**

### #4: Contact Information

- U.S. Primary Phone (this number will be used for [automated text outreach](#) if applicable)
- Email
- Preferred Method of Contact<sup>+</sup>
- Preferred Language<sup>+</sup> (when set to "Text Message" or "Email," a Primary Phone number or Email will become required)

Address

Address Line 1 **1000 Hightide Way**

Address Line 2 ---

City **Shovel**

State <sup>\*</sup> **NC - North Carolina**

Postal Code **27949**

County <sup>\*</sup> **Nash**

### #5: Address

- Address Line 1 (street address)
- City
- State<sup>\*</sup>
- Postal Code
- County<sup>\*</sup> (use county of case if not known)

Personal Info

Job Title **Work Company Ltd.**

Employer **Part-Time Cashier**

School Student or Staff? ---

### #6: Personal Info

- Job Title (if known)
- Employer (if known)
- School Student or Staff? (if known; see next page for additional fields)

Personal Info

Job Title ---

Employer ---

School Student or Staff? **Student**

County of Institution **Alamance**

Institution Name

Institution Search Instructions

Schools

Test 2

[Advanced lookup](#)

If "Student" or "Staff" is selected within the **School Student or Staff?** field:

- **County of Institution** (choosing a county will narrow the institutions shown)
- **Institution** (if known)

Search the **Institution** field using a wildcard (\*) as a substitute for any unknown text ([see p.2](#)). If the institution is not available in the **Institution Name** dropdown, check the **Other Institution** field and then enter its name manually in **Institution Name (Other)**. Otherwise, you should leave these fields blank.

Demographic Info

Gender **Female**

Race **Other**

Ethnicity **Not Hispanic or Latino**

Calculated Age ---

Manual Age (if DOB is not available) ---

## #7: Demographic Information

- Gender
- Race
- Ethnicity
- Manual Age (if no DOB)

**Save your work** **Save** to finish. If needed, you can then use **Assign** **Assign** at the top of the screen to assign this ME to someone else. Single-click "Me" to input a "User or Team" and assign this contact to them.

**You're all done!**

## What's Next?

- Your contact will be sent an [automated digital exposure notification](#) upon saving as long as you have completed the required fields plus **Email** and/or **US Primary Phone** (and "Monitoring End Date" is not set to a date before today).
- If you are a contact tracer, [check the roadmap](#)! The [CCTO job aids](#) can also help with what you need to know about [beginning monitoring](#) and [documenting your outreach](#).